



ITEC
Image Technologies



docuTRAK

Tech Support Policy & Procedures

Support Policies & Procedures

1. Introduction

This document is intended to detail and explain the procedure of placing a support ticket and how support will be handled after the first call is placed by the Customer. The response process of handling a support ticket is also explained.

2. Support Request Initiation

Customer support requests should be submitted through ITEC Support Portal. Requests made through phone should be supported by email or fax. First line of support will be provided through email or telephone calls to the Customer from ITEC Help Desk. The following are information of email addresses and phone numbers available to receive the support request:

support@itecj.com

Tel 5540890 X555

Fax 5540894

Login to Support Portal: <http://portal.itecj.com/login.php>

(Username & PW will be provided)

If the respective Customer feels at any time that first line support through email and telephone calls is not sufficient to solve the issue, the Customer should request a site visit or a remote support session (as applicable) to solve the issue.

3. Handling a New Support Request

Logging the Request:

When a request is received, a support ticket will be initiated by Help Desk on the Support Portal. The ticket is logged with complete details in ITEC Help Desk software and a ticket number will be automatically generated for the Customer. The ticket number is automatically forwarded to the Customer by e-mail. This Ticket number acts as a unique identifier to both the Customer and ITEC support team to easily track the problem and is especially useful for the Customer when the issue is to be reopened.

In case of support requests launched through the Support Portal directly by the customer, a ticket number is also automatically generated and is sent to the Customer in the form of an email. This e-mail will contain the generated Ticket Number and the Title & Description of the support request.

ITEC support staff should acquire from the support request the following information according to the structure given below:

- a) **Title:** <Brief error description> : <Name of system>. Example: "Missing logs: docuTRAK system".
- b) **Severity:** How severe is the issue. Options for severity are:
 - High:** causes the system at server side to stop functioning or produce an error resulting in wrong behavior.
 - Medium:** Causes part of the system at End User side to stop functioning or produce an error resulting in wrong behavior.
 - Low:** system continues to function but produces an error resulting in marking it more difficult to work on the system (inconvenience).
- c) **Product:** product name where the error/issue occurred.
- d) **Description:** A complete description of the problem and what scenario the user is doing that caused the problem.
- e) **Contact Name:** The complete information (name, contacts etc.) about the person reporting the issue should be available for further communication.

Inform the Customer:

The Customer is informed by email notification of the issue Status and the support person who is assigned to it. The issue **Status** falls under 9 situations:

- a) **Open:** this is given to the issue as soon as it is reported on the Help Desk system, and a ticket is issued.
- b) **In Progress:** this is given to the issue after a support person is assigned to it. This status denotes that Response is made to the Customer.
- c) **Wait for Response:** this is given to the issue when the support person had requested certain action from the Customer to enable us complete our job
- d) **Fixed Ready to Apply:** this is given to the issue after a support person found the source of error and fixed it and is waiting for the Customer to allow the application of the fix.
- e) **Waiting for Code Fix (Int.):** this is given to the issue after a support person verifies issue as requiring code to be fixed, and such code fix is performed by development team at ITEC.
- f) **Waiting for Code Fix (Ext.):** this is given to the issue after a support person verifies issue as requiring code to be fixed, and such code fix is to be provided by the development team at the SW supplier.
- g) **Verify to Close:** this is given to the issue after a support person resolved it and uploaded the service report on the ticket. At this status, response from the Customer is required to close the ticket.
- h) **Verification Pending:** this is given to the ticket when verification cannot be completed whether reason is due to Customer or ITEC.
- i) **Closed:** this is given to the issue after receiving update from the Customer that fix is working or after the expiry of second notification to the Customer (Refer to Escalation & Response section).

This should help keep the customer informed that ITEC support is currently looking into and handling the issue.

Checking the issue and resolving it:

Answers to Customer are designed to be in such a way that gives the best possible answer to the Customer. Communication flux should be decreased as much as possible by means of providing the correct most appropriate answer as quickly as possible.

ITEC support staff will use the below guidelines when formulating their answer:

- a) Check the internal knowledge base for a possible answer to the Customer's request.
- b) If internal knowledge base is not adequate consult with software makers stating the complete case history.
- c) Answer within an acceptable timeframe (as set forth later in this document).

Received issues are classified under the following **Categories:**

Incorrect Behavior: indicates that the behavior of the system was not correct and within this category falls any software BUG.

General Enquiry: indicates that Behavior of the system is correct but users require clarification of certain known issues or need guidance to proper use of the system.

Enhancement: indicates that the request does report any incorrect behavior in the system but users require the system to perform in a different way.

Professional Services: indicates that the Customer's request is not covered by maintenance contract and needs to be handled through an offering of professional services.

Demo Request: indicates that the Customer is requesting SW on trial basis.

In the case of Incorrect Software Behavior support staff simulate/reproduce the behavior as detailed by the Customer. Once reproduced, if the error is considered a BUG, then it is directly escalated and reported to Software Development and the Customer is informed that this case has been escalated to development and is provided with Expected Fix Delivery Date.

If the Incorrect Behavior is due to causes other than a software BUG support staff will work on fixing the Incorrect Behavior except where cause originated from computer environment or other systems to which the system interfaces or integrates. In this case Customer intervention will be needed.

ITEC support staff will request the Customer representative to co-sign a "Support Call Report" – as given in Appendix A- upon performing any of the following:

- 1) Conducting a site visit regardless the issue was resolved or not
- 2) Resolving the issue through a "Remote Support Session".

When Details Are Not Enough:

If the provided information is incomplete, support staff will immediately request more details from the Customer to the level that would assist in resolving the issue (Ticket status: Wait for Response). Requests for further details should be made in writing through email or Support Portal. The Support Portal will automatically notify the Customer's contact through email notification.

Further Customer Communication:

When there is frequent interaction between the Customer and support staff with regard to a specific ticket, for any reason, all of this communication should be sequentially logged under the same ticket number given at the start of the support process. This will help keep the ticket history up to date and allow other support staff to track the ticket more efficiently for more accurate and faster Customer support.

4. Response & Response Delay Escalation:

If for any reason the Customer is unsatisfied with the response time on the reported issue, the Customer can escalate to the Sales Account Manager or Senior Company Management. This escalation shall only be applicable to requests classified as "Incorrect Behavior".

Escalation can be achieved by sending an email with a CC to the technical support specialist handling the ticket. The email should also carry the ticket number.

Response to support requests shall be performed in accordance with the following procedures:

Response Process for Software Errors:

Event	Action to be taken
Ticket Received	Submission of response of "In Progress" status to the Customer within 4 working hours*
Issue is open without a resolution for 24 hours from Response time	Customer is informed of the new Status & Category accordingly
The issue is reproduced and it is a BUG	Escalate to Development and provide Expected Fix Delivery Date** to the Customer
Resolution Provided to the Customer	Customer confirmation is required on resolution, to make sure it is satisfactory
Resolution applied and the Customer did not answer for 2 days	Submission of first Reminder.
2 more days elapsed	Submission of second Reminder
2 more days elapsed without feedback	Ticket is closed and Customer is informed that ticket status is "Closed"

5. Customer Reporting:

Customers with access to the Support Portal are able to obtain reports on all support tickets (Open & Closed). This is considered as an adequate reporting means from a Customer's perspective. If however


further reporting is specified in the contract with the Customer, ITEC will provide such reports as specified.

Software Updates and New Versions

The Customer is entitled to obtain all software updates and new versions as officially released by the software maker. Software updates will be installed at no charge to the Customer by ITEC support staff based on scheduled dates with prior arrangement. However, installation of a new version will be chargeable at the going professional services charges at the time.

Appendix – A

Support Call Report



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2012 / 0451

VISIT DATE	
TIME IN	
TIME OUT	

CUSTOMER SUPPORT VISIT REPORT

Customer Name	Phone No:
Contact Person	E-mail :

HARDWARE	Serial #
SOFTWARE	Version
OPERATING SYSTEM	

Under Warranty
 No Warranty
 Maintenance Contract

Issue as Reported by the Customer:	Issue Description by ITEC
Work / Action Executed :	

Job for Next Visit :	ITEC Recommendation:

<input type="radio"/> Job Completed <input type="radio"/> Job Partially Completed <input type="radio"/> Job Pending	ITEC Engineer's Name : Signature:	Customer Rep. Name : Signature :	<u>Data Backup (By Customer)</u> <input type="checkbox"/> Yes <input type="checkbox"/> No Last Backup Date :
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TICKET NO. / /
 REQUEST DATE / /
 REQUEST TIME

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